




New Fiscal Year/Initial L USPS-R EMIS Staff Checklist

- 1) ___ After the previous EMIS fiscal year end window L closes, the **EMIS Reporting Configuration** needs to be changed to the new fiscal year. Update the **EMIS Configuration Fiscal Year**. Go to **System->Configuration-EMIS Reporting Configuration**. Enter the new fiscal year and  If you need assistance with this, please submit a help desk ticket to HCC.
- 2) ___ Archive all prior year compensations using **Mass Change** option in **Contract Compensations** or **Non-Contract Compensations** (if you will be archiving non-contract compensations). Filter using **Compensation Stop Date**, **Description**, or **Label** to pull in all compensations for prior fiscal year. Run a report displaying the compensations which will be archived and save the report for audit purposes. Using **Mass Change** select the **Archived Employee** definition. Please contact HCC if you need this mass change definition saved in your system. Select **Execution Mode**. Click **Submit Mass Change**. This will archive the old contracts and prevent them from pulling into the EMIS collection.
- 3) ___ Check your Report Manager to ensure the [EMIS Demographic Data Report](http://education.ohio.gov/getattachment/Topics/Data/EMIS/EMIS-Documentation/Current-EMIS-Manual/3-3-Staff-Demographic-CI-Record-v7-0.pdf.aspx?lang=en-US) has been saved in **Reports->Report Manager**. This report is used to verify **Employee Demographic EMIS (CI)** elements will be included from the **Employee** records records when the SIF data collection is processed. <http://education.ohio.gov/getattachment/Topics/Data/EMIS/EMIS-Documentation/Current-EMIS-Manual/3-3-Staff-Demographic-CI-Record-v7-0.pdf.aspx?lang=en-US>

Verify

Identification- **Number, SSN, Credential ID**

Name- **Last Name, First Name, Middle Name, Suffix**

Dates- **Birth Date, Last Paid Date, Termination Date**

General- **Gender, Report to EMIS**

Experience- **Authorized Experience, Principal Experience, Total Experience**

Race- **Primary Race, American Indian Alaska Native, Asian, Black, Hispanic Latino Option, Native Hawaiian Pacific Islander, White**

State Reporting- **ECE Qualification, Degree Type, Non-Certificate Employer ID, Semester Hours**

Record Field Number	Data Element	Initial L	Final L
CI150	Absence Days Element		√
CI155	Absence Days/Long-term Illness Element		√
CI140	Attendance Days Element		√
CI200	Authorized Teaching Experience Years Element	√	√
CI070	Date of Birth Element	√	√
CI225	Early Childhood Education Qualification Element	√	√
CI100	Education Level Element	√	√
CI290	First Name	√	√
CI090	Gender Element	√	√
CI310	Last Name	√	√
CI300	Middle Name	√	√
CI280	Prefix Name	√	√
CI330	Principal Experience Years	√	√
CI080	Racial/Ethnic Group Element	√	√
CI110	Semester Hours Element	√	√
CI270	State Staff ID Element	√	√
CI320	Suffix Name	√	√
CI210	Total Experience Years Element	√	√

- 4) ___ Generate the following **Position** and **Compensation Reports** from **Reports->Report Manager** to verify **Staff Employment EMIS (CK)** elements will be included from the **Position** or **Compensation** records when the SIF data collection is processed-
<http://education.ohio.gov/getattachment/Topics/Data/EMIS/EMIS-Documentation/Current-EMIS-Manual/3-4-Staff-Employment-CK-Record-v8-0.pdf.aspx?lang=en-US>

EMIS Active Position Report-

Verify **Position #, Position Description, Job Status**
Employee/Identification-Number,
Employee/Name- Last Name, First Name,
Employee-Extended Service, FTE,
EMIS Related Information-Reportable to EMIS, Position Code, State Reporting Appointment Type, Position Type, Position Status, Special Education FTE, Low Grade, Separation Reason, Paraprofessional, High Quality Professional Development, High Grade, Separation Date, Paraprofessional Hire Date, Building IRN
Funding Source- Assignment Area, Funding Source Code 1, Percent 1, Funding Source Code 2, Percent 2, Funding Source 3, Percent 3,



[EMIS Inactive Position Report](#) (After creating csv can filter to remove any Termination date before current fiscal year.)

Verify **Position #, Position Description, Job Status**
Identification-Number
Name- Last Name, First Name
Dates- Termination Date
Employee-Extended Service, FTE
EMIS Related Information-Reportable to EMIS, Position Code, State Reporting Appointment Type, Position Type, Position Status, Special Education FTE, Low Grade, Separation Reason, Paraprofessional, High Quality Professional Development, High Grade, Separation Date, Paraprofessional Hire Date, Building IRN
Funding Source- Assignment Area, Funding Source Code 1, Percent 1, Funding Source Code 2, Percent 2, Funding Source 3, Percent 3,
Position Date- Stop Date

[EMIS Active Contract Compensation Report](#)

Compensation- Type, Unit Amount, Contract Work Days, Hours in Day
Date Range- Compensation Start Date, Compensation Stop Date
State Reporting- Reportable to EMIS
Position- Position #, Position Description, Job Status
Identification- Number
Name- Last Name, First Name
Contract- Contact Amount, Pays in Contract

[EMIS Active Non-Contract Compensation Report](#)

Compensation-Type, Pay Unit, Unit Amount, Hours in Day
Date Range- Compensation Start Date, Compensation Stop Date
State Reporting- Reportable to EMIS
Position- Position #, Position Description, Job Status
Identification-Number
Name- Last Name, First Name

[EMIS Inactive Non-Contract Compensation Report](#)


Compensation-Type, Pay Unit, Unit Amount, Hours in Day
Date Range- Compensation Start Date, Compensation Stop Date
State Reporting- Reportable to EMIS
Position- Position #, Position Description, Job Status
Identification-Number
Name- Last Name, First Name



The Staff Employment (CK) Record and the relevant elements are to be reported as follows.

Record Field Number	Data Element	Initial L	Final L
CK220	Assignment Area Element	√	√
CK090	Building IRN Element	√	√
CK050	Employee ID Element	√	√
CK210	Extended Service Element	√	√
CK260	Grade Levels Assigned\Low Element	√	√
CK270	Grade Levels Assigned\High Element	√	√
CK280	High Quality Professional Development Question Element		√
CK160	Length of Work Day Element	√	√
CK250	Local Contract Code Element	√	√
CK190	Pay Amount/Rate Element	√	√
CK180	Pay Type Element	√	√
CK060	Position Code Element	√	√
CK100	Position FTE Element	√	√
CK130	Position Fund Source Elements	√	√
CK120	Position Fund Source Percent Element	√	√
CK300	Position Separation Date Element	√	√
CK230	Position Separation Reason Element	√	√
CK080	Position Start Date Element	√	√
CK070	Position Status Element	√	√
CK140	Position Type Element	√	√
CK290	Qualified Paraprofessional Element	√	√
CK170	Scheduled Work Days Element	√	√
CK310	Special Education FTE Element	√	√
CK150	Type of Appointment Element	√	√

- 5) ___ If a district has or needs to have CC or CJ records go to the **Core->EMIS Entry** option and add or update the respective records.
- 6) ___ Once all data has been added successfully to the respective record click the **Extract CC** or **Extract CJ** record option within the CC or CJ records.
- 7) ___ Save the CC or CJ file to your desktop or a folder of your choosing. This file will then need to be either uploaded to the data collector by the payroll employee or sent to their EMIS coordinator for uploading. **Please contact HCC via help desk ticket if you have difficulties with uploading your data successfully.**
- 8) ___ **Clearing long term illness data from last fiscal year** - To clear long-term illness data, please contact HCC help desk for a mass change definition to clear last year's data, if you do not have one saved in your system.
 - a) If you wish to filter for any long-term illness employees on the grid, click the **More** button and under **State Reporting** click **Long Term Illness**.
 - b) You can then filter the **Long Term Illness** field entering on the grid >0.00.
 - c) Run a report and save it for audit purposes.
 - d) You will then click on the Mass Change.
 - e) Go to the bottom of the screen and chose *Execution mode* radio button.
 - f) Go to *Load Definition* and choose from the drop down *Clear EMIS Long Term Illness*.
 - g) Click Submit Mass Change

- 9) ____ **Incrementing the years of experience** for employees - It is important to update the years of experience at the beginning of each new fiscal year. These elements are reported in both the Initial and Final Staff Course L reporting periods.
- **Authorized Years of Experience**-is reported only for certified/licensed employees. It is extremely important to update this element each year. In some cases, this element is used for funding purposes. It is also used to determine eligibility for the National Board Certification exam. Non-authorized experience (i.e., teaching service in a college, a university, or a related institution, including the Peace Corps) is not to be included. However, it can be reported in the Total Experience Years Element.
 - A new teacher would have "0" authorized teaching experience years in both the Initial and Final Staff/Course (L) Collections of the current school year (20-21). This number would then be updated to "1" during the following year's reporting (21-22)
 - **Total Years of Experience**-Indicates the total number of years of all certificated/licensed educational service (authorized and non-authorized) in elementary schools, secondary schools, colleges, universities, and any other public or nonpublic educational institutions (including the Peace Corps). This element is reported only for certified/licensed employees. Include active military service years up to the maximum allowable five years.
 - **Principal Years of Experience**-Indicates the total number of years of certificated/licensed educational service as a school leader, serving as a principal or assistant principal, or with the duties and responsibilities typical of those two positions, in Ohio or in other states, in the following types of organizations: public schools, including vocational schools, state supported schools, STEM schools, community schools, and ODE-licensed preschools, and in chartered, nonpublic schools, such as independent private schools, or parochial schools.
 - There is a **mass change definition** to increment experience years, if your district needs it loaded into your system, please contact HCC.
- a) Go to **Core->Employee**
 - b) On your grid from the **More** button, add *Authorized Experience, Total Experience, Principal Experience* (under the *Experience* category) and *Termination Date, Last Paid Date* (under the *Dates* category)
 - c) Go to the **Advanced Query** and choose *termination date* and **Operation=IS_NULL**. Save this query as "No Termination Date", and then click **Apply Query**.
 - d) Click on **Reports** and save a report for audit purposes.
 - e) Select the **Mass Change** button. Under Load Definition field drop down and select *Increment Experience*.
 - f) Select the *Execution* radio button, then select . This will increment the Total Experience and Authorized Experience. There is a separate Mass Change Definition to update Principal Experience, or that can be done on the individual Employee screen.
- 10) ____ **Clear any previous fiscal year value from the EMIS override fields** - Go to **Positions** under **EMIS Related Information** - Contract Amount/Contract Work Days/EMIS Override Hours In the Day or you can use Mass Load creating a spreadsheet using the format 'Excel-FieldNames'



from the Position grid, including **Number, Pos#, Contract Amount, Contract Work Days, Hours In the Day.**

- a. Contact HCC for assistance with creating a csv file for making the Mass Load change.